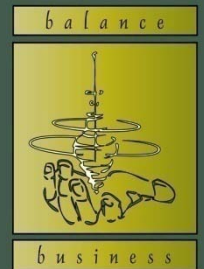




## *CHARTER START WORKSHOPS*

# Marketing & Communications



# Workshop Agenda

- ▣ Marketing Plan
- ▣ Messaging
- ▣ Targeted Marketing
- ▣ Media
- ▣ Public Relations
- ▣ Community Engagement

# Marketing Plan

- What is marketing?
  - Everything you do to recruit and retain students
- Why communicate?
  - Tell your school's story
- Who needs to hear?
  - All stakeholders-parents, faculty, staff, board members, students, business leaders and community members
- How do you plan?
  - Marketing outline

# Marketing Plan

- ▣ Current and Desired Positioning
- ▣ Vision and Mission
- ▣ Current Situation
- ▣ Goals and Objectives
- ▣ Target Audience(s)
- ▣ Organization Strengths and Weaknesses
- ▣ Competitive Environment
- ▣ Unique Value Proposition
- ▣ Strategies
- ▣ Messaging (for each target area)
- ▣ Tactics
- ▣ Budget/Timeline

# Marketing Plan

## Marketing Plan Outline- Handout #1

### Marketing Plan Outline

- Current Positioning
- Desired Positioning
- Mission/Vision
- Current Situation
- Goals
- Objectives
- Target Audience(s)
- Organization Strengths
- Organization Weaknesses
- Competitive Environment
- Unique Value Proposition
- Strategies
- Messaging (for each target area)
- Tactics
- Budget/Timeline



# Messaging

- Vision, mission, values alignment
- Communication
  - Channels
  - Process
  - Methods
  - Styles
- Internal and external focus
- 60 second elevator speech
- Talking points

# Messaging

- ▣ Develop succinct, consistent description of school's philosophy, educational programs, and benefits answering
  - Who are we?
  - What do we stand for?
  - Why does it matter?
  - Where are we headed?
- ▣ Develop appropriate communication materials
  - Website
  - Email
  - Brochures
  - Newsletters
  - Print advertising

# Targeted Marketing

- Data analysis
  - Surveys
  - Research
- Describe the area or market/ district in which the school will operate
- Student population
  - What segment of the district's population do you plan to serve?
- Parent population
  - What is the demographic?

# Targeted Marketing

- ▣ Economics
- ▣ Competition
  - What other school(s) are seeking the same student population?
  - Include private, public, magnet, parochial and other charter schools
- ▣ Business and Community Stakeholders
- ▣ Strategic Partners

# Media

- Paid Advertising
  - Print (newspaper, magazine, community publications)
  - Radio
  - TV (network, local, cable)
  - Billboards, bus boards, etc.
- Unpaid coverage in print/radio/TV
  - Community events listings
  - Newsworthy items
    - Achievements
    - Events
- Unpaid advertising via Web/Email

# Media

## Creating an Effective Press Release- Handout #2

### Creating an Effective Press Release

The best and most traditional way of getting your story out to the news media is through a press release (also known as a news release). A press release can be used for most types of news media, with subtle changes for radio and television.

News releases are not the time to get creative with language. They should be very straightforward. Focus on the facts: WHO, WHAT, WHEN, WHERE, WHY and of course HOW. You want to reach the reporter and impress them with the event, story or "hook," the news angle that is going to get the reporter interested in attending an event or writing about charter schools.

It is best to write a news release as factually and as concisely as possible. Keep in mind that reporters and editors come across dozens, if not hundreds, of press releases a day.

Here are a few key points to consider:

- Put the important factual information in the first paragraph.
- Put your release on your organization or school letterhead.
- Include a contact person and a daytime phone number at the top of the page.
- Include a quote from a charter school leader. If your news is an event featuring a visit from a distinguished guest (i.e. an elected official); be sure to include a quote from that person as well.
- Spell out all numbers from one to nine. Use numbers for 10 and up.
- Page number your news releases if they go beyond one page. It is important to remember that most news releases should be a single page in length.
- Always put the date at the top of your press release.
- Send your press release to the media early in the morning on the day of the release. It is best if the reporter receives the release just before arriving to work.
- Follow up the release with a phone call to the reporter you are targeting.
- Signal the end of your news release at the bottom with this symbol: ###
- MOST IMPORTANT! Have more than one person proofread your document. Check it thoroughly for typos or mistakes.



# Media

## Example Press Release- Handout #3

ID State Dept of Education Charter Start Workshop – Marketing & Communication

### Example Press Release

FOR IMMEDIATE RELEASE  
January 21, 2004

CONTACT: Gary Larson  
Director of Media Relations  
California Charter Schools Association  
(866) 411-2272

#### **LEGISLATIVE ANALYST CALLS FOR ELIMINATING CHARTER SCHOOL CAP, STREAMLINING CHARTER FUNDING, EXPANDING CHARTER AUTHORIZERS**

*New Report Suggests Ways to Grow and Improve Charter School Movement,  
Address Inefficiencies in Law*

Sacramento, CA – A major report released Tuesday by the Legislative Analyst's Office (LAO) recommends that the California Legislature remove the current cap on the number of charter schools, streamline charter school funding and allow for multiple authorizers.

The LAO report, entitled, "Assessing California's Charter Schools", follows the two state-sponsored evaluations of charter schools since charter law was enacted in 1992, including last year's landmark report by the RAND Corporation (2003). The LAO concluded that "charter schools are a viable reform strategy—expanding families' choices, encouraging parental involvement, increasing teacher satisfaction, enhancing principals' control over school-site decision making, and broadening the curriculum without sacrificing time spent on core subjects."

"Despite significantly less funding and political hurdles, California's charter schools perform every bit as well as traditional public schools – especially on behalf of disadvantaged students," said Caprice Young, CEO of the California Charter Schools Association. "By implementing the Legislative Analyst's recommendations, our Legislature can take a bold step which will allow more charter schools the ability to improve public education and close the achievement gap."

The LAO's specific recommendations to the Legislature include:

- **Removing the cap on the annual growth of charter schools** – The 1992 California Charter Schools Act capped the number of charter schools that could operate at 100. This was modified through legislation in 1998 to allow 250, and allowing 100 new schools each year thereafter. The cap currently stands at 750 for the 2003-04 year. The LAO report pointed to the fact that 18 states have charter school laws that do not limit the number of charter schools that can operate.
- **Reforming the Charter School Categorical Block Grant** – According to the report, "The trend most incompatible with the original intent of charter schools is the increasing number of categorical programs for which charter schools must apply separately." The LAO recommended consolidating 14 categorical programs back into the General Block

# Media

## Earned Media Coverage- Handout #4

### Earned Media Coverage

Paid advertising isn't the only means of marketing your charter school. In fact, earned media—positive news coverage that you actively work to get by creating and pitching newsworthy stories, events, or announcements to news outlets in your area—is not only free, it's generally considered to be more objective by consumers.

To get stories published as news and have them create the desired outcome, public-relations people within an organization must follow two rules: (1) Ensure that a story is newsworthy and (2) make the story easy for reporters to cover, usually through some press-friendly event.

#### The First Rule – Make it Newsworthy

Having one or more of five qualities in an event will dictate whether the event is newsworthy and, therefore, more likely to get covered in the way most desired.

##### Newsworthy Quality #1: Timeliness

The subject of the story itself doesn't have to be new, but there must be something that happened or is about to happen that will trigger the urgency on the part of the news organization to cover the event. Ensuring timeliness demands that PR professionals maintain a daily awareness of ongoing issues, ones that might be characterized as "hot button." Examples would be analyses of school performance (especially those done by organizations or individuals hostile to charter public schools); the life of a bill that would affect the school's stakeholders; and statements by politicians that need endorsement or denunciation by the organization. Ensuring timeliness also means developing techniques to ensure the story or event is fresh (or appears fresh), such as leaking information about a story to a reporter with whom the PR professional has a good, ongoing relationship; or getting sources to the reporter before a story "breaks," i.e., making sure that the source is available and has talking points (discussed later) to discuss with the reporter before the event happens.

##### Newsworthy Quality #2: Pathos

Pathos is something that evokes emotion. Reporters want desperately for their readers to connect emotionally with the people in their stories (love them, hate them, feel sorry for them, whatever). How do they do this? To make a story or event emotionally connect, it needs real people who are affected by the issue. How can you use pathos to help your charter school obtain more press? Think about a student who beat the odds to graduate near the top of her class, students who volunteer at the local senior center, the annual toy drive organized by the sixth grade class, etc. Sit down in August and start a calendar of all the opportunities throughout the school year that you can use to draw positive attention to your charter school and students.



# Media

## Periodically Evaluate Effectiveness

- Did your advertising achieve the intended outcome?
  - Ask prospects when/where/how they heard of your school
  - Track conversion rate of prospects to students
  - Ask donors when/where/how they heard of your school
- Fix what's not working
- Target your limited resources effectively

# Public Relations

- ▣ Develop partnerships and provide value to parents, staff, faculty, board members and the public
- ▣ Public relations:
  - Promotes community input
  - Anticipates image problems and provides solutions
  - Handles publications including newsletter and website
  - Acts as key contact for media: writes press releases; works to get media coverage of school news
  - Designs objective, informational material for budget/bond issue campaigns
  - Designs all levels of communications, including writing a crisis communication plan
  - Conducts public relations research, surveys, and polls; interprets results
  - Creates avenues for student/staff recognition
  - Trains employees in the importance of public relations

# Public Relations

- How to accomplish all of this?
  - Improve basic communications
    - Phone calls answered in courteous, friendly, helpful manner
    - Voice mail system is easy to use, calls are returned promptly
    - Meetings/school events publicized well in advance
    - Teachers and administrators accessible to parents and community stakeholders
  - Proactive communication with parents/public
    - Timely, relevant newsletter

# Public Relations

- Develop well-defined crisis communication plan *prior to the crisis*
  - Understand the circumstances, define the problem
  - Keep faculty and staff informed first
  - Immediate written communication with parents including all facts and intended response
  - Single point of contact for media
    - Stick to facts, have them in writing
    - Be honest, but don't speculate
    - Never say something you don't want to see in print
    - Be calm and clear

# Community Engagement

- ▣ To whom are we most accountable? Our stakeholders include:
  - Students
  - Parents
  - Board members
  - Broader community
- ▣ Engagement is a two-way street ...the school listens to parents and the community, communicates and reports to them about their charter school, and invites involvement in the school by its stakeholders

# Community Engagement

- Listening to stakeholders may include:
  - Surveying parents to solicit input prior to making a major policy decision
  - Convening a series of parent/community forums chaired by board members to discuss a major challenge facing the charter school
  - Hosting monthly parent coffees to create informal opportunities to meet and hear concerns
  - Designing strategic planning process with ample opportunities for parent and community participation

# Community Engagement

## Community Engagement Strategies- Handout #5

### National School Boards Association -- Leadership for Student Achievement: A Board of Education Framework

KEY ACTIONS	COMMUNITY ENGAGEMENT STRATEGIES
Engage in a comprehensive planning process to establish a clear vision of <b>student achievement as top priority</b> of school board, staff, and community.	<ol style="list-style-type: none"> <li>1. Involve community in vision setting process through open forums, solicitation of input, and broad-based review.</li> <li>2. Include community in regular reevaluation and adjustment of vision.</li> <li>2. Establish a process for on-going community involvement in the planning.</li> </ol>
<p>Set clear <b>standards for student performance</b>. <i>Questions to ask about standards:</i></p> <ul style="list-style-type: none"> <li>• Are they related to something external and credible in our community?</li> <li>• Do they deal with what students should know and be able to do at key points in their school career?</li> <li>• Are they disseminated clearly and widely to students, staff, and community?</li> </ul>	<p>Create community forums to discuss:</p> <ul style="list-style-type: none"> <li>• What standards should be set for your students</li> <li>• How your proposed standards relate to state, national, or international norms</li> <li>• What needs your parent, business, and higher education communities identify for students.</li> </ul>
<p>Establish an <b>assessment process</b> that measures student achievement at regular intervals. <i>Questions to ask about assessment:</i></p> <ul style="list-style-type: none"> <li>• Is it explicitly tied to standards?</li> <li>• Does it assess both knowledge and skill?</li> <li>• Does it use multiple, ongoing measures (not single, high-stakes testing)?</li> <li>• Is there a "range" of achievement targets being assessed that represent what the local educational community feels are important educational outcomes?</li> <li>• Does it measure more than minimum competencies?</li> <li>• Does it provide progress data for every student?</li> <li>• Do we know and understand how the results of the assessments produced will be used?</li> <li>• How will results of assessments be shared with teachers and curriculum developers?</li> <li>• How will it be used to alter instruction to focus on greatest needs?</li> <li>• Does it provide individual teacher-level progress</li> </ul>	<ol style="list-style-type: none"> <li>4. Establish community advisory representation as essential part of assessment development and review process.</li> <li>5. Assure that assessment program is widely and thoroughly explained to the community at large both through meetings and the media.</li> </ol>

# Community Engagement

- ▣ Reporting to stakeholders may include:
  - Conducting a breakfast briefing for civic leaders describing school's unique educational programs and positive impact on student achievement.
  - Writing personalized letters to major donors thanking them for contributions.
  - Including monthly column authored by the board president in newsletter outlining key issues facing the school.

# Community Engagement

## Strategic Alliances, Partnerships, & Collaborations

- ▣ Mutually beneficial, well-defined relationship entered into by two or more organizations to achieve common goals, including:
  - Public-private partnerships
  - Joint initiatives with organizations with similar missions
  - Partnerships with community groups serving families from same target market as served by school
  - Contractual agreements with organizations to enhance the quality of education provided by school

# Community Engagement

## Charter School Partnerships- Handout #6

### Charter School Partnerships

All charter school partnerships are not alike. The types of partnerships that exist between charter schools and other organizations can be distinguished based on three characteristics:

- What is the nature of resources exchanged in the partnership?
  - Financial resources
  - Human resources
  - Physical resources
  - Organizational resources
- What is the form of the partnership?
  - Formal
  - Informal
- What is the depth of involvement in the partnership?
  - One level
  - Multi level

The types of organizations charter schools elect to partner with vary widely but commonly include the following:

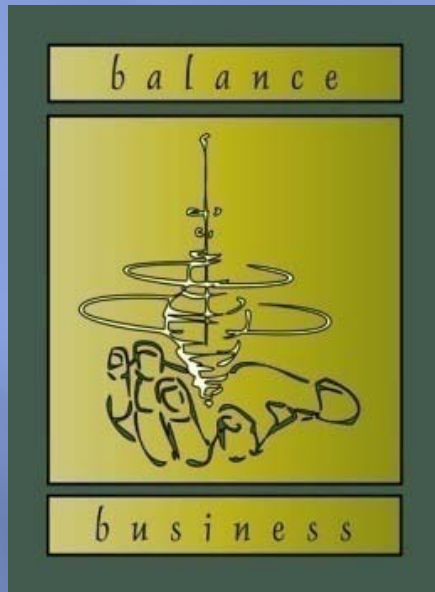
Sector	Types of Organizations
Non profit	<ul style="list-style-type: none"><li>• Community-based organizations (recreational centers, neighborhood outreach agencies)</li><li>• Cultural institutions (museums, local performance groups)</li><li>• Educational institutions (private colleges, universities)</li><li>• Faith-based organizations (churches)</li><li>• Nonprofit educational management organizations</li><li>• Race/ethnic-based organizations</li><li>• Social service providers (child and family welfare agencies)</li><li>• Private foundations</li></ul>
For profit	<ul style="list-style-type: none"><li>• Education management organizations</li><li>• Local businesses</li></ul>
Public	<ul style="list-style-type: none"><li>• Cultural institutions (art museums, science museums)</li><li>• Educational institutions (school districts, community colleges, universities)</li><li>• Public health providers (hospitals)</li><li>• Government/Municipalities (city offices, mayor's office)</li><li>• Police departments</li></ul>

#### Lesson 1: Weigh the Costs of Partnering

An established partner can offer a range of resources—additional finances, a unique curriculum, access to facilities—needed for a school's survival. Some charter school leaders acknowledged that, were it not for the funds provided by a partner, the school simply would not exist.

# Workshop Summary

- ▣ Marketing Plan
- ▣ Messaging
- ▣ Targeted Marketing
- ▣ Media
- ▣ Public Relations
- ▣ Community Engagement



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